



## Due Diligence Questionnaire

### STRATEGIC FIT

Questions for the organization	Questions for yourself
What is the organization's overall mission?	Do the organization's mission and goals align with my philanthropic objectives?
What problems and issue areas are the organization aiming to address?	Is this organization addressing problems that align with my philanthropic priorities?
Does this organization focus on meeting immediate needs or changing the broken system?	Does this organization's time scale match my intended financial commitment? If not, am I willing to contribute to its work, at the risk of observing marginal progress?
Who are this organization's target beneficiaries?	Is this organization well positioned to support systems change work (if that's what I care about)?
What is the organization's geographic scope?	Does this organization serve the beneficiaries I am interested in helping?
How does the organization determine its strategic focus? Is this organization open to collaborative decision making?	Does this organization work in the communities that I want to support?
How does this organization define success?	Would I be able to provide input for their strategic design and operation? How much control will I be able to have?
	Is this organization's definition of success comparable to my standards?

## ORGANIZATIONAL CAPACITY

### Questions for the organization

How is the organization managed, and what does its day to day operations look like?

What are the organization's strengths? How is the organization leveraging its strength in its operations?

What are the organization's weaknesses? What is it doing to improve?

How does this organization compare to its peers in the same geographic area or issue area? What sets it apart?

What is the organization's annual budget? What is their main source of funding? What are their main costs?

Is this organization on the path of becoming financially self-sufficient? Or will it require long-term financial support from donors and grantmakers?

### Questions for yourself

Does this organization operate efficiently enough to maximize the impact of my giving?

Does the organization have the capacity to achieve, or substantially contribute to, the impact that I'm seeking?

Will the organization's weaknesses hinder its ability to achieve my desired impact? Am I well positioned to help the organization improve on its weaknesses?

Is this organization the best candidate to achieve the most impact in the communities or issue areas that I care about? Or are there other better alternatives?

Is this organization financially secure enough to focus on achieving the impact that I'm seeking?

Does this organization's financial need match my desired commitment? If not, am I in a position to provide matching funds or expand their funder base?

## HUMAN CAPITAL

### Questions for the organization

Who is leading the organization? What is their professional experience and background?

What is the organization's governance structure?

How many staff does the organization have? What are their backgrounds and expertise?

Does the organization have any strategic partners or external advisors? What other organizations are in this organization's network?

### Questions for yourself

Do I trust their judgement and leadership? Will being associated with them pose any reputational risks for me?

How do I feel about their board? Would I want to be associated with their members?

Does the staff have the requisite experience, skill sets, and capacity to execute on the organization's mission and help achieve my desired impact?

Will this organization be able to draw on its connections for additional support? What can I contribute with my expertise and network?

# IMPACT

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## Questions for the organization

What is the organization's track record of carrying out previous grants or funding programs?

Does this organization engage in impact measurement? How is the organization setting, tracking, and evaluating its performance goals?

How does this organization report its impact? Are their annual reports or impact reports available to the public?

Does this organization have any information on beneficiary feedback of their programs? Is that information accessible?

## Questions for yourself

Do I trust that this organization will be able to successfully carry out programs and use funds effectively?

If impact measurement is important to me, will this organization be able to report its impact to me in a satisfactory manner?

Can I access their past annual reports? Am I satisfied with their level of accountability?

Does this organization practice good constituency listening? Do I find their impact measurement results reliable?